

Quality Tax & Bookkeeping Service, Inc

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Dear Clients,

Greetings! This is the last year-end letter I'll write to you from Quality Tax. That's right, I'm retiring after this upcoming tax season; the official closing date will be November 15, 2016. And while I'm looking forward to a less stressful life filled with grandkids, travel, and hobbies...I know I will miss you, my clients. The trust and loyalty you've given me these past 30 years is truly humbling; I will always be grateful.

This summer I consulted with a business broker to learn how to refer my clients to someone with my level of expertise and commitment. He was impressed by my client list, but my average rate (\$100/appointment) is only half of the industry standard. He suggested that I make my fees more comparable to the standard by adding \$50 to my appointment fee. Such a move, he said, would interest a higher-quality successor.

So I have re-vamped the pricing chart I sent out last year. This may seem like a huge increase; I realize that for some of you it is. However, many of you last year had more complicated taxes (with the extra schedules for rentals, capital gains, businesses) yet, because you came to your appointment fully prepared so that I could finish your return within the time limit, I still only charged you the appt fee. I will continue to honor that practice...trying to keep your fees commensurate with the time I must put into your return preparation. Dependent's tax fees will remain the same.

Here are the new rates:

INDIVIDUAL TAXES (Form 1040/1040A)	Dropping Off	Appt With Sue
Minimum Charge	\$100	\$150/half hr appt
With Simple Taxes for Dependents	An extra \$20-\$50 per return	An extra \$30-\$50 per return if time
With Rental Properties (Schedule E)	An extra \$50-\$300	
With Capital Gains (Schedule D)	An extra \$50-\$200	
With Sole Proprietorship (Schedule C)	An extra \$100-\$400	
PARTNERSHIP TAXES (Form 1065)	\$350 - \$1500	
CORPORATE TAXES (Form 1120/1120S)	\$550 - \$3000	
TAX-EXEMPT TAXES (Form 990)	\$500 - \$2500	

Also remember that we accept **all** credit and debit cards.

Tax Credits Still Available for 2015 Tax Returns

Education Credits.....Adoption Credits.....Earned Income Credit

Congress has until the end of the year to legislate "extenders" on popular deductions that are due to expire. If you recall, their last-minute legislation in 2014 kept ALL the expired deductions in play. We need to wait and see what will happen with teacher credits, equipment expensing, and MIP deductions.

I have included the "special situation" tax preparation list on the back. But everyone should bring:

- **W-2s and last pay stubs**
- **Any bank tax forms showing interest earned or interest paid**
- **The social security numbers and birthdates of any dependent children and/or relatives (relatives must have lived with you for the entire year)**
- **Canceled checks of any estimated tax payments (federal or state)**
- **Higher education expenses incurred by you, your spouse, or your college-aged children**
- **Everyone must bring proof of health insurance coverage (your ins. company will send you a form)**

If you are dropping off your taxes, please bring them in an envelope with your name, correct address, and phone number clearly printed on the outside. **"Drop offs" will not be accepted after Sun, April 3rd!**

So, I hope to see you in the upcoming tax season. Marj is here to book your appointments Mon-Fri, 9:00 to 3:00, so give her a call! And thank you...for everything.

Sue Lastowski, Enrolled Agent